

Phase 2: Org Setup & Configuration

Salesforce Edition

- **Developer Edition** is used for this project as it provides free access to core Salesforce features, suitable for testing and learning.

Company Profile Setup

- Configured the **University Profile** with details like name, address, time zone, and currency.
- **Use Case:** This ensures that all operations in Salesforce (requests, approvals, reports) follow the university's working hours and regional settings.

Business Hours & Holidays

- Configured **business hours** from 9:00 AM – 5:00 PM, Monday to Friday.
- Added university holidays (e.g., Independence Day, Republic Day).
- **Use Case:** If a student submits a request outside business hours, it is routed but notifications are only processed during working hours.

User Setup & Licenses

- **Profiles and Users created:**
 - Students → Standard Users.
 - HODs → Approver Role.
 - Admin → System Administrator.
- **Use Case:** A student cannot access the approval dashboard, while HODs can view and act on student requests.

Login Access Policies

- Configured so that only **university-registered users (students, HODs, admins)** can access the org.
- Prevents unauthorized access to sensitive academic data.

Sandbox Usage

- Created a **Developer Sandbox** for testing new features like approval processes before deploying to the main org.
 - **Use Case:** Safely test validation rules and flows without affecting real student requests.
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Phase 3: Data Modeling & Relationships

Custom Objects

- **Student** (Stores student details like Name, Roll Number, Department).
- **Permission_Request** (Tracks requests with fields like Request Type, Department, Status, Comments).
- **Department_Query** (Stores student-submitted questions with fields like Query Title, Description, Response).

Fields

- On **Permission_Request**:
 - Request_Type (Picklist: Leave, Event, Project, Other).
 - Department (Lookup to Department).
 - Status (Picklist: Submitted, Pending, Approved, Rejected).
- On **Department_Query**:
 - Query_Title, Query_Description, Response.

Relationships

- **Student → Permission_Request**: Master-Detail (One student, many requests).
- **Student → Department_Query**: Lookup (One student, many queries).

Record Types

- On **Permission_Request**:
 - Leave Request
 - Event Request
 - Project Permission
- **Use Case**: Enables different page layouts and approval paths depending on request type.

Page Layouts

- **Student Layout**: Only shows fields required for submitting a request (Request Type, Reason).
- **HOD Layout**: Shows additional fields like Status, Approval History.

Compact Layouts

- For quick mobile/Lightning view → shows essential fields (Request Type, Status, Department).

Schema Builder

- Used to visually design objects and relationships.
- **Use Case:** Clearly represents how Student, Permission_Request, and Department_Query connect.

Relationship Types

- Master-Detail: Permission_Request depends on Student record.
- Lookup: Department_Query references Student without strict dependency.